

CS469514-L

A Checklist to Build Checklist Templates in BIM 360 Field Management

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About the speaker

Nauman Mysorewala

Autodesk Expert Elite, Architect, LEED AP

Revit Architecture and AutoCAD Certified Professional

Authorized Autodesk Services Marketplace provider

More than 25 years of experience with the Autodesk® family of products including AutoCAD®, AutoCAD Architecture, Revit®, BIM 360 & Navisworks®.

Presented at numerous times at AU and other conferences

Presented and moderated numerous Autodesk Build your IQ webinars for AutoCAD and Revit in collaboration with Autodesk.

Moderator for Autodesk Community Meetups for Architecture and BIM Management

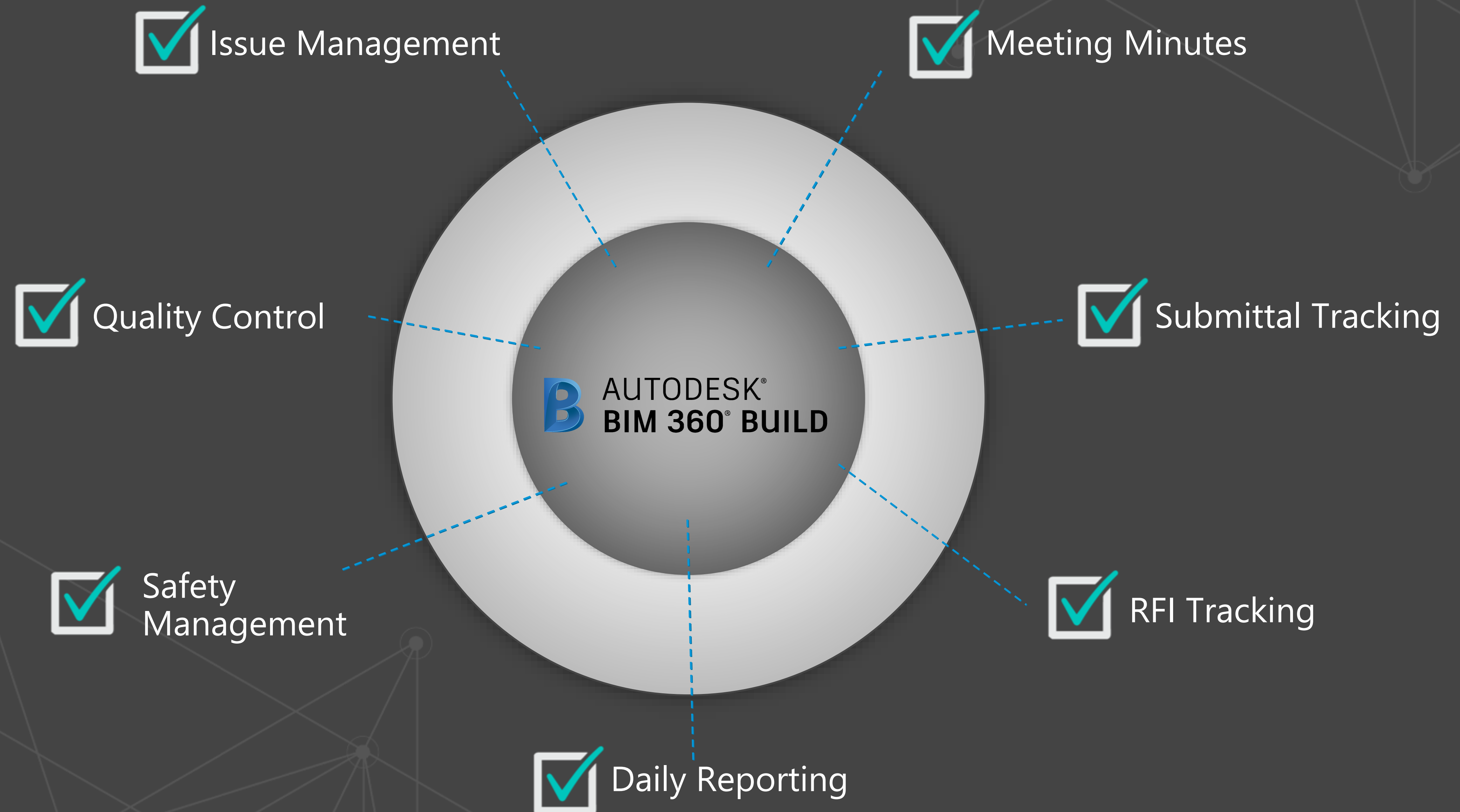
Educator at University of Cincinnati & Mount St. Joseph University teaching design technology applications.

Enjoys discovering new products and technologies and implementing them in the built environment.

Learning Objectives

- Learn about Account Admin and Project Admin roles in designing and implementing Checklist Templates.
- Learn how to easily create Quality, Safety, Commissioning, or Punch list Checklist Templates.
- Learn how to create Checklist Templates from scratch and configure checklist Items and integrate Issues.
- Learn how to link Checklist Templates to Assets and Asset Categories
- Learn how to export Checklist data

THE BIM 360 BUILD WORKFLOW



ISSUE MANAGEMENT

Create and assign issues and get insights into root causes

- Search, sort, track and export all Issues created
- Tag root causes to see where to focus attention
- Assign to team members by individuals, roles, or companies

AUTODESK BIM 360 | Autodesk - Tristam Wallace > Pacific Center

Field Management

TEMPLATES CHECKLISTS ISSUES DAILY LOGS

Search

Export Create New Issue

Type: All Types Status: All Statuses Location: All Locations Assigned To: All Assignees Root Cause: All Root Causes Scheduled: Choose Dates

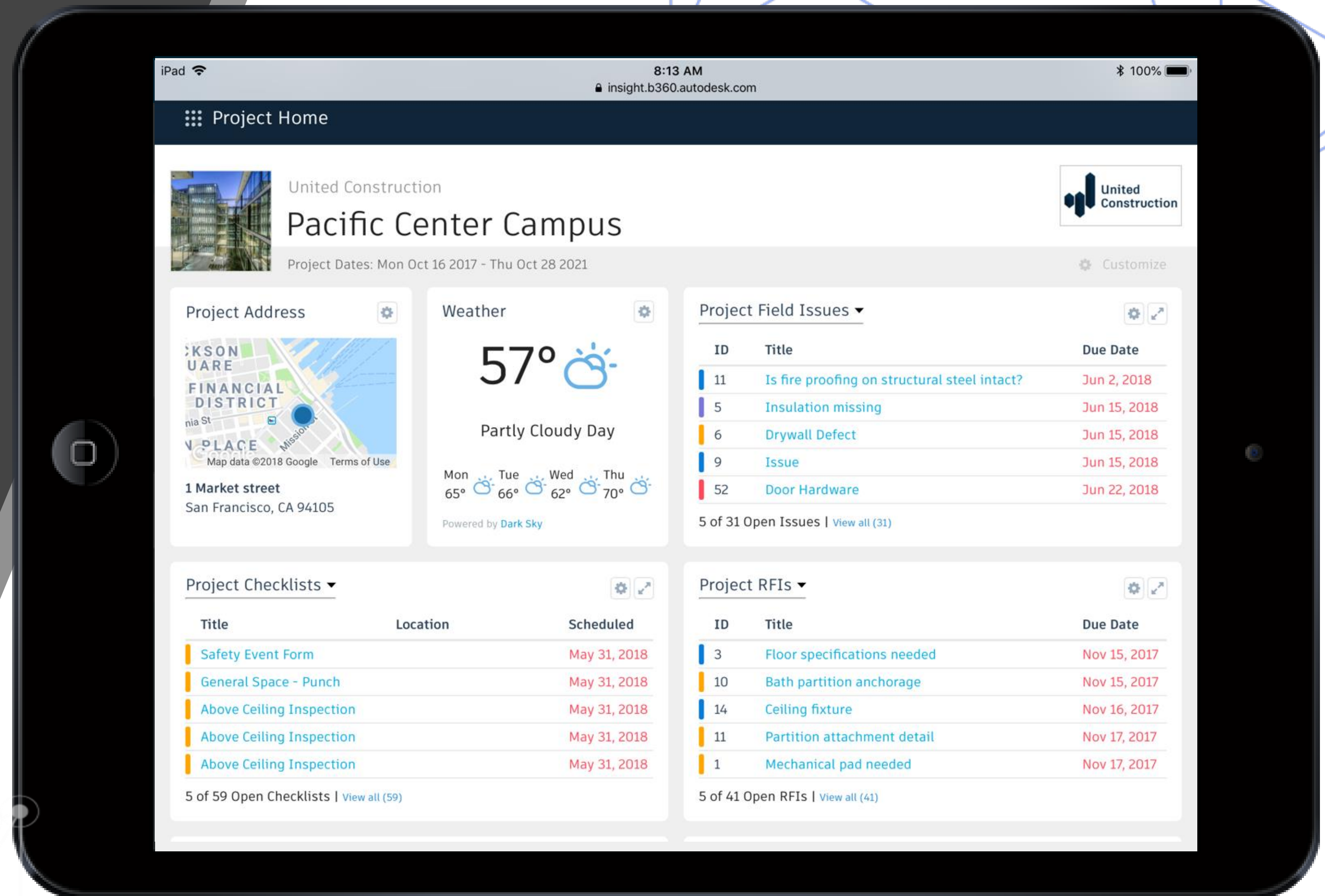
ID	Title	Location	Assigned To	Company	Issue Type	Root Cause	Due Date	Document		
26	ff	Level 4			Quality				0	0
25	Vapor barrier	Level 2 > ... > New Area	Michael Wall En...	Michael Wall En...	Quality	Incomplete Work	Dec 5, 2017		0	0
24	Concrete finish not as specified	Level 2 > Open Office	Miller & Assoc.	Miller & Assoc.	Punch List	Design Change	Nov 30, 2017	A501_ACTIONS	0	0
23	Vapor barrier : failed	Level 3	Michael Wall En...	Michael Wall En...	Quality	Installation	Dec 5, 2017		0	0
22	Cracked drywall	Level 4 > Office area	Ben Johnson	Michael Wall En...	Punch List	Missed Inspection	Nov 18, 2017		0	0
21	Skyroof	Level 2 > ... > New Area	Deb Miller	Miller & Assoc.	Quality	Workmanship	Mar 27		0	0
20	Check dimensions	Roof > Roof area	Subcontractor		Quality	Barricade	Mar 30	A500_ACTIONS	0	0
19	Trash pickup	Level 2 > Open Office	Designer		Quality	Housekeeping	Mar 27		0	0
18	Needs maintenance	Basement > boiler room	Ben Johnson	Michael Wall En...	Quality	Confined spaces	Mar 23		0	0
17	Cord damaged	Basement	Tristam Wallace	Qualcomm	Safety	Sharp Edges	Mar 23		0	1

Showing 1 - 20 of 23

<< < 1 of 2 > >>

CONNECTED

- Mobile
- Team collaboration
- Design to Construction

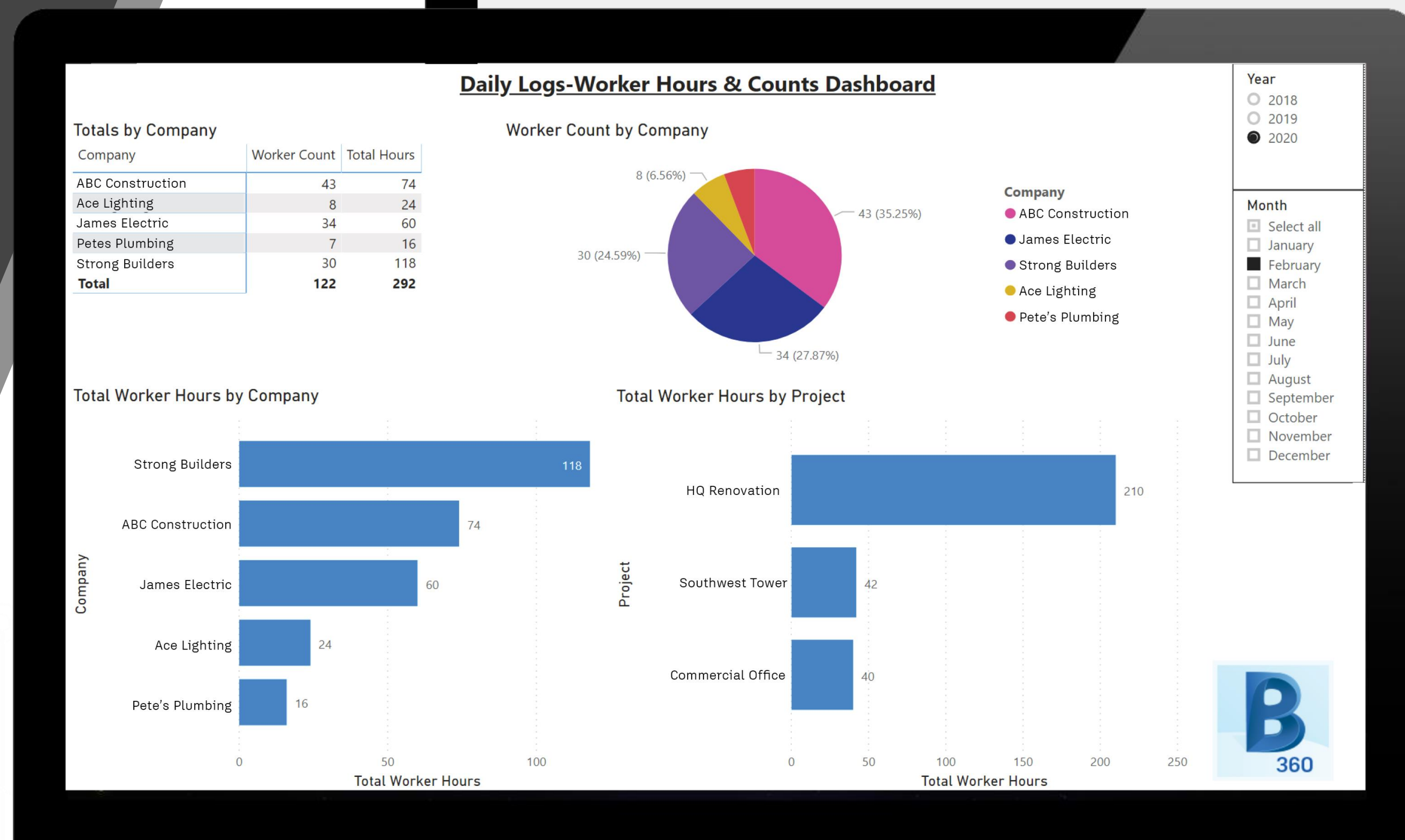
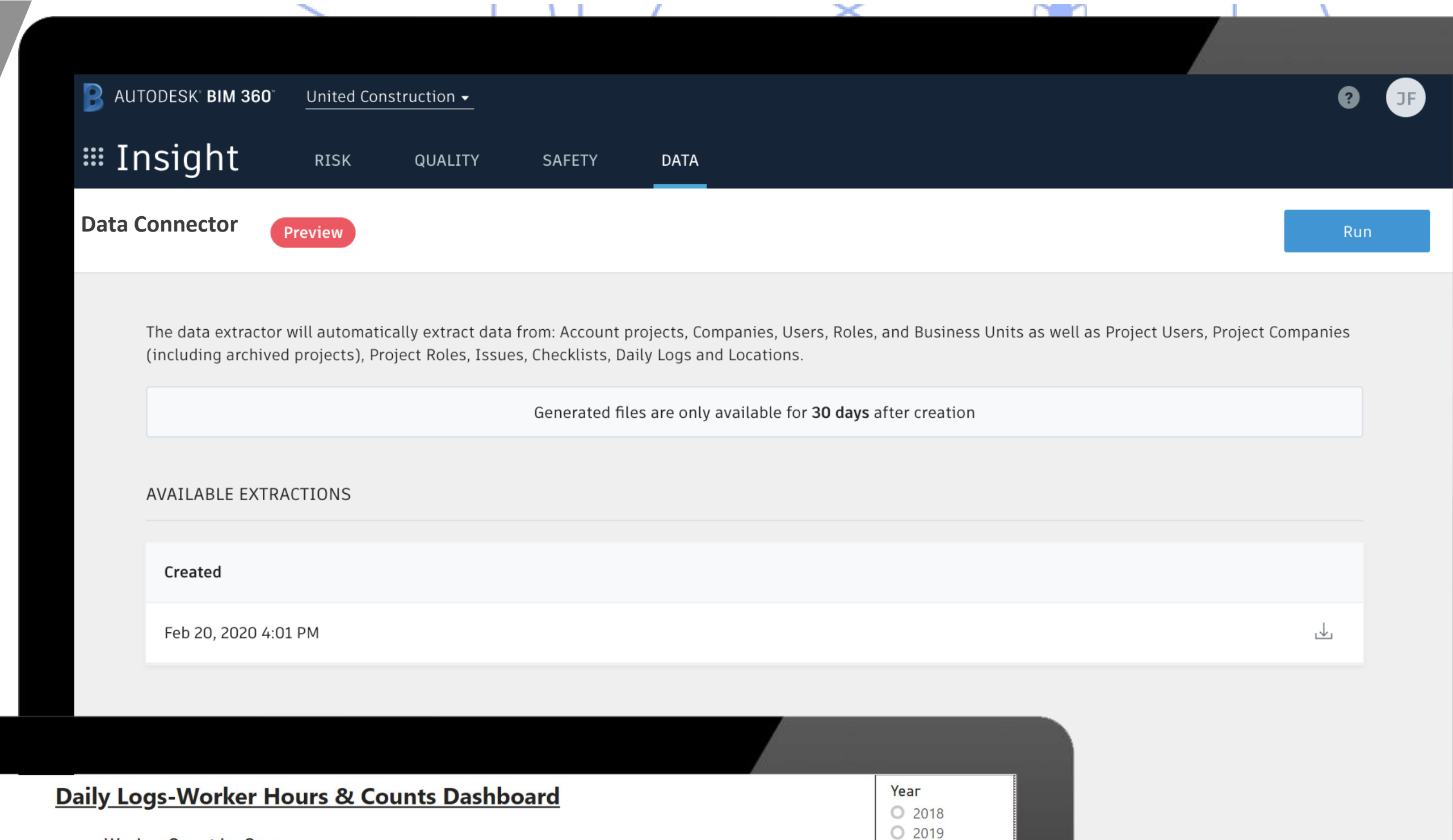


DATA CONNECTOR

PREVIEW RELEASE

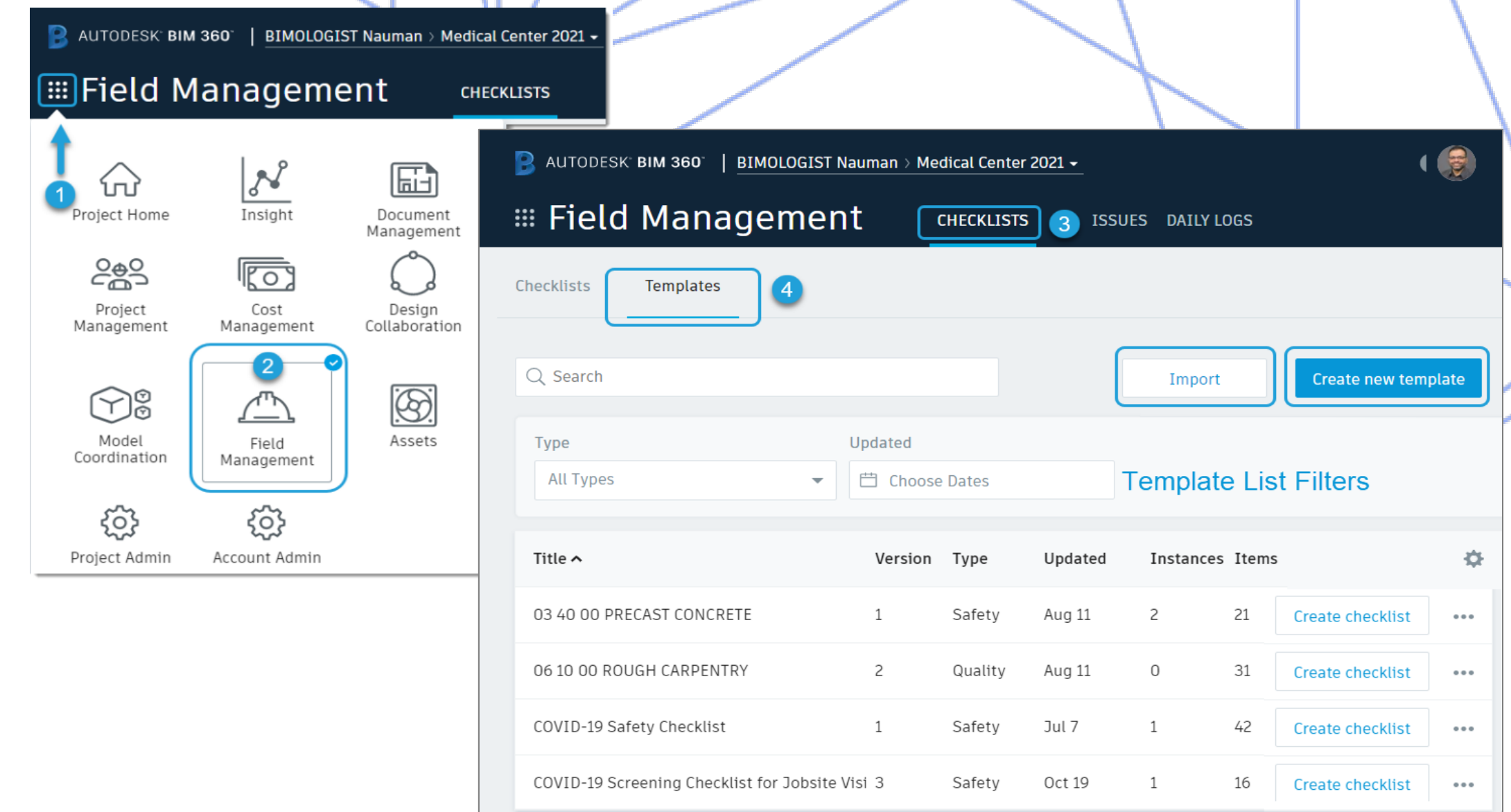
One-click access to extract all your project data


- Improve cross project data analysis
- Leverage capabilities of robust Business Intelligence tools
- No need to write a single line of code



Checklists

Checklists allow Project team to create standard forms to capture, review and follow through completion for quality and safety related tasks.



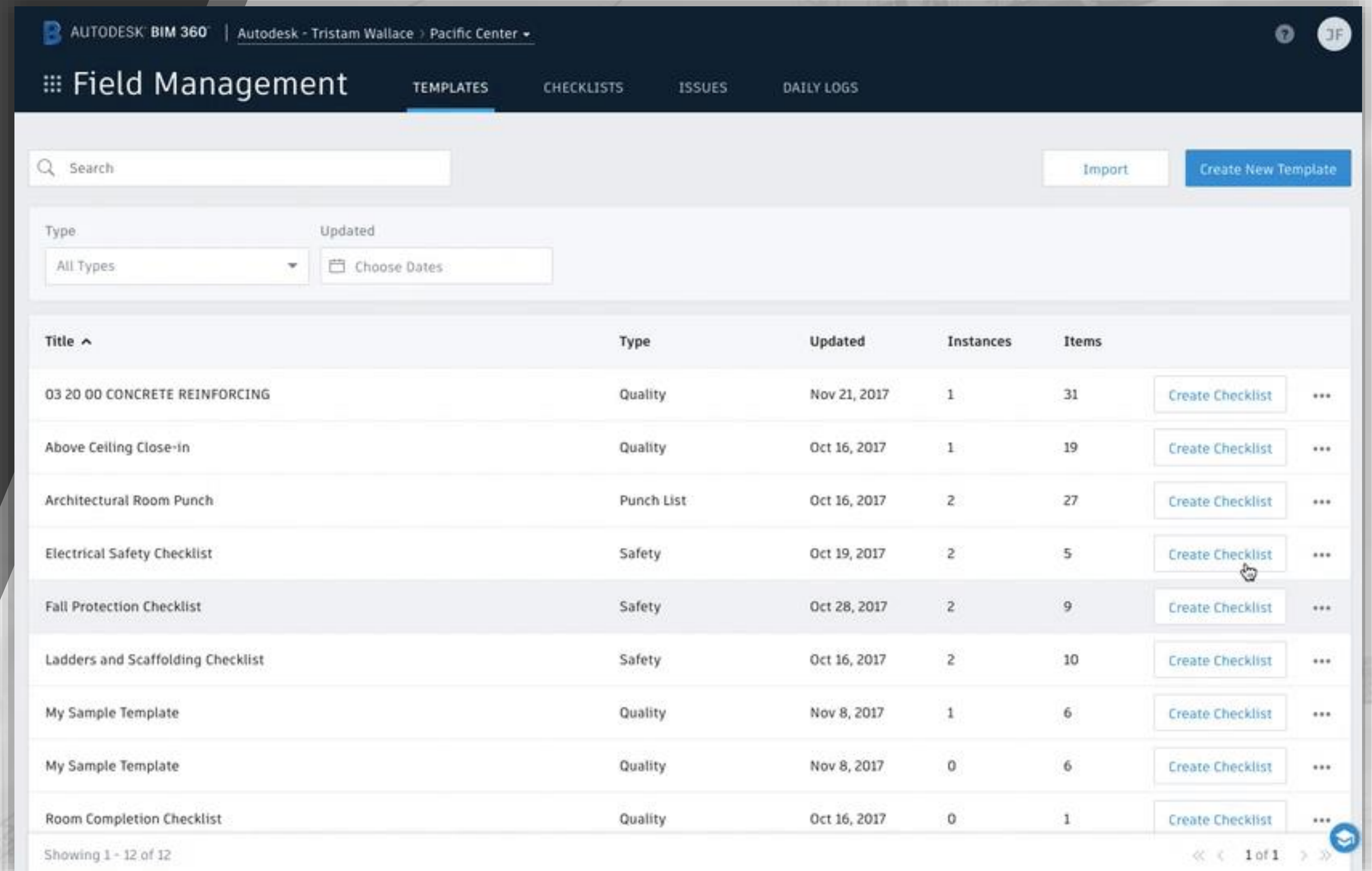
- Checklists are part of the Field Management module in BIM 360 Build
- Integrate with Issues feature for tracking and assignment of responsibility
- Integrates with Assets module
- Collected data used to analyze nds via Insight on the Project Dashboard or export for use and analysis outside the BIM 360 ecosystem



QUALITY CONTROL

Import existing checklists or create from scratch

- Easily create quality, safety, commissioning or punch list checklists
- Use templates to build checklists from scratch
- Search, sort and track checklist completion



The screenshot displays the Autodesk BIM 360 Field Management web application. The header includes the Autodesk BIM 360 logo, user information (Autodesk - Tristram Wallace > Pacific Center), and navigation tabs for Field Management, Templates, Checklists, Issues, and Daily Logs. Below the header is a search bar and buttons for 'Import' and 'Create New Template'. A filter section shows 'Type' set to 'All Types' and an 'Updated' date picker. The main content is a table listing various templates with columns for Title, Type, Updated date, Instances, and Items. Each row includes a 'Create Checklist' button and a menu icon. The table shows 12 items, with the first 9 visible. The footer indicates 'Showing 1 - 12 of 12' and a page indicator '1 of 1'.

Title ^	Type	Updated	Instances	Items	
03 20 00 CONCRETE REINFORCING	Quality	Nov 21, 2017	1	31	Create Checklist ...
Above Ceiling Close-in	Quality	Oct 16, 2017	1	19	Create Checklist ...
Architectural Room Punch	Punch List	Oct 16, 2017	2	27	Create Checklist ...
Electrical Safety Checklist	Safety	Oct 19, 2017	2	5	Create Checklist ...
Fall Protection Checklist	Safety	Oct 28, 2017	2	9	Create Checklist ...
Ladders and Scaffolding Checklist	Safety	Oct 16, 2017	2	10	Create Checklist ...
My Sample Template	Quality	Nov 8, 2017	1	6	Create Checklist ...
My Sample Template	Quality	Nov 8, 2017	0	6	Create Checklist ...
Room Completion Checklist	Quality	Oct 16, 2017	0	1	Create Checklist ...

SAFETY MANAGEMENT

Encourage safety program adoption with routine inspections and reporting

- Document and share safety materials
- Assign nonconforming checklist observations
- Track and manage safety issues
- View reports and identify root cause

The screenshot displays a mobile application interface for safety management. The left panel shows a list of checklists under the heading 'Checklists Pacific Center Campus'. The right panel provides a detailed view of a selected checklist item, '1 Door', showing progress and inspection details.

Checklists Panel (Left):

- Checklist 1:** NOT STARTED, Nov 2, 2017. General Space - Punch - Level 2 Conf A 1895. David Sanchez. 0% Completed.
- Checklist 2:** NOT STARTED, Nov 18, 2017. Pre-drywall Inspection. Subcontractor. Level 2 > Lab Storage 1610. 0% Completed.
- Checklist 3:** NOT STARTED. Pre-drywall Inspection. Unassigned. 0% Completed.
- Checklist 4:** NOT STARTED. Pre-drywall Inspection. Unassigned. 0% Completed.

Detailed View Panel (Right):

9:08 AM 6% battery

0/10 Sections Completed

1 Door 0/4 Done

1.1 Door

YES	NO	N/A

Issue Note Photo

1.2 Door Frame

YES	NO	N/A

Issue Note Photo

1.3 Door Hardware

YES	NO	N/A

Checklists Categories and Types

Safety Management

- SAFETY - Allows onsite staff to perform health and safety related inspections and capture data for compliance and tracking incidents

Quality Management

- QUALITY - Perform quality assurance checks.
- PUNCH LIST - Perform onsite inspections capturing and tracking quality issues and seeing them through completion
- COMMISSIONING - Validation of building performance and data capture

Type *

Quality

Punch List

Safety

Commissioning

Checklist

AUTODESK BIM 360

BIMOLOGIST Nauman

Medical Center 2021

Field Management

CHECKLISTS

ISSUES

DAILY LOGS

<

In progress

#14 COVID-19 Screening Checklist for Jobsite Visitors

CHECKLIST OUTLINE

1 Visitor Information & ...5 / 12

2 COVID-19 Health Questions0 / 0

3 If the answer is NO to all o...0 / 4

Required signatures

0 / 1

1 Visitor Information & Health Questions5 / 12 Completed

Assigned To: Unassigned

1.1 Visitor Name

Nauman Mysorewala

Document

Issue

Note

Photo

1.2 Visitor Company

Jerde

Document

Issue

Note

Photo

1.3 Have you been asked to self-quarantine in the last 14 days?

Yes

✗

No

NA

Document

Issue

Note

Photo

1.4 Have you been in close contact with anyone who has been asked to self-quarantine in the last 14 days?

✓

Yes

No

NA

Document

Issue

Note

Photo

1.5 Have you experienced any cold or flu-like symptoms in the last 14 days (to include fever, cough, sore throat, respiratory illness, difficulty breathing)?

Yes

✗

No

NA

SAFETY CHECKLIST

Checklists Templates

For creating Checklists, there needs to be a Template defined to be used to create multiple Checklists

Two levels of Templates

Account-level Templates

- Only Account Admins of the managing company can create, update and publish templates to multiple projects.
- Multiple projects within the same account can utilize the templates
- Can be updated and republished across multiple projects

Project-level Templates

- Requires Project Admin rights to create or update templates
- Project Admins can allow other team members based on Company, Role, or individuals to create or update templates.
- Cannot be utilized by other projects within the same account

Templates cannot be exported to use in other accounts or projects!

Pre-requisites for Checklist Template Creation

CHECKLIST: Pre-requisites for Checklist Template Creation	
<input type="checkbox"/>	Autodesk ID
<input type="checkbox"/>	BIM 360 Build license
<input type="checkbox"/>	Project membership for non-Account-level templates
Required Permissions:	
<input type="checkbox"/>	Account Admin for Account-level templates
<input type="checkbox"/>	Project Admin for Project-level templates, Creating Checklists, Assigning User permissions
<input type="checkbox"/>	Minimum Create permission for Templates and Checklists.
<input type="checkbox"/>	Internet connection
<input type="checkbox"/>	Compatible web browser http://autode.sk/3mgj5wD Note: Template creation is not supported via the BIM 360 app



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